ORDER FOR SUPPLIES OR SERVICES

IMPORTANT: Mark all packages and papers with contract and/or order numbers.

1. DATE OF ORDER: 09/15/2017	2. CONTRACT NO. *(If any)*: EP-W-17-020
3. ORDER NO.: 0002	4. REQUISITION/REFERENCE NO.: PR-OEI-17-00301

5. ISSUING OFFICE *(Address correspondence to)*
HPOD
US Environmental Protection Agency
William Jefferson Clinton Building
1200 Pennsylvania Avenue, N. W.
Mail Code: 3803R
Washington DC 20460

6. SHIP TO:
a. NAME OF CONSIGNEE: HPOD
b. STREET ADDRESS: US Environmental Protection Agency
William Jefferson Clinton Building
1200 Pennsylvania Avenue, N. W.
Mail Code: 3803R
c. CITY: Washington | d. STATE: DC | e. ZIP CODE: 20460
f. SHIP VIA:

7. TO: [redacted]
a. NAME OF CONTRACTOR: INTERNATIONAL BUSINESS MACHINES CORPORATION
b. COMPANY NAME:
c. STREET ADDRESS: 6710 ROCKLEDGE DRIVE
d. CITY: BETHESDA | e. STATE: MD | f. ZIP CODE: 20817

8. TYPE OF ORDER
☐ a. PURCHASE
REFERENCE YOUR:

Please furnish the following on the terms and conditions specified on both sides of this order and on the attached sheet, if any, including delivery as indicated.

☒ b. DELIVERY
Except for billing instructions on the reverse, this delivery order is subject to instructions contained on this side only of this form and is issued subject to the terms and conditions of the above-numbered contract.

9. ACCOUNTING AND APPROPRIATION DATA: See Schedule
10. REQUISITIONING OFFICE:

11. BUSINESS CLASSIFICATION *(Check appropriate box(es))*
☐ a. SMALL ☒ b. OTHER THAN SMALL ☐ c. DISADVANTAGED ☐ d. WOMEN-OWNED ☐ e. HUBZone
☐ f. SERVICE-DISABLED VETERAN-OWNED ☐ g. WOMEN-OWNED SMALL BUSINESS (WOSB) ELIGIBLE UNDER THE WOSB PROGRAM ☐ h. EDWOSB

12. F.O.B. POINT: Destination

13. PLACE OF a. INSPECTION	b. ACCEPTANCE	14. GOVERNMENT B/L NO.	15. DELIVER TO F.O.B. POINT ON OR BEFORE *(Date)*	16. DISCOUNT TERMS
Destination	Destination		Multiple	

17. SCHEDULE *(See reverse for Rejections)*

ITEM NO. (a)	SUPPLIES OR SERVICES (b)	QUANTITY ORDERED (c)	UNIT (d)	UNIT PRICE (e)	AMOUNT (f)	QUANTITY ACCEPTED (g)
	DUNS Number: 835130485 TOCOR: Holly Fenderson Continued ...					

18. SHIPPING POINT:
19. GROSS SHIPPING WEIGHT:
20. INVOICE NO.:

17(h) TOTAL *(Cont. pages)*: $1,648,576.00

21. MAIL INVOICE TO:
SEE BILLING INSTRUCTIONS ON REVERSE
a. NAME: RTP Finance Center
b. STREET ADDRESS (or P.O. Box): US Environmental Protection Agency
RTP-Finance Center (AA216-01)
109 TW Alexander Drive
www2.epa.gov/financial/contracts
c. CITY: Durham | d. STATE: NC | e. ZIP CODE: 27711

17(i) GRAND TOTAL: $8,742,105.00

22. UNITED STATES OF AMERICA BY *(Signature)*: 09/15/2017 Tim Nyberg ELECTRONIC SIGNATURE

23. NAME *(Typed)*: Timothy S. Nyberg
TITLE: CONTRACTING/ORDERING OFFICER

ORDER FOR SUPPLIES OR SERVICES
SCHEDULE - CONTINUATION

IMPORTANT: Mark all packages and papers with contract and/or order numbers.

DATE OF ORDER	CONTRACT NO.	ORDER NO.
09/15/2017	EP-W-17-020	0002

ITEM NO. (a)	SUPPLIES/SERVICES (b)	QUANTITY ORDERED (c)	UNIT (d)	UNIT PRICE (e)	AMOUNT (f)	QUANTITY ACCEPTED (g)
	Admin Office: HPOD US Environmental Protection Agency William Jefferson Clinton Building 1200 Pennsylvania Avenue, N. W. Mail Code: 3803R Washington DC 20460 Period of Performance: 09/16/2017 to 09/15/2022					
0001	Base: Customer Advocacy Communications and Training Support Delivery: 09/15/2018 Accounting Info: 17-18-C-HP2-ZZZHF8-2505-17HPEAS013-002 BFY: 17 EFY: 18 Fund: C Budget Org: HP2 Program (PRC): ZZZHF8 Budget (BOC): 2505 DCN - Line ID: 17HPEAS013-002 Funding Flag: Complete Funded: $20,000.00 Accounting Info: 17-18-B-HP2-ZZZHF8-2505-17HPEAS013-003 BFY: 17 EFY: 18 Fund: B Budget Org: HP2 Program (PRC): ZZZHF8 Budget (BOC): 2505 DCN - Line ID: 17HPEAS013-003 Funding Flag: Complete Funded: $70,000.00				1,390,743.00	
0002	Base: OPTIONAL TASK 8 Customer Experience Delivery: 09/15/2018 Accounting Info: 17-18-B-HP2-ZZZHF8-2505-17HPEAS013-003 BFY: 17 EFY: 18 Fund: B Budget Org: HP2 Program (PRC): ZZZHF8 Budget (BOC): 2505 DCN - Line ID: 17HPEAS013-003 Funding Flag: Complete Funded: $10,000.00				257,833.00	
0003	Option Year 1: Customer Advocacy Communications and Training Support (Option Line Item) Continued ...					
	TOTAL CARRIED FORWARD TO 1ST PAGE (ITEM 17(H))				$1,648,576.00	

ORDER FOR SUPPLIES OR SERVICES
SCHEDULE - CONTINUATION

IMPORTANT: Mark all packages and papers with contract and/or order numbers.

DATE OF ORDER	CONTRACT NO.	ORDER NO.
09/15/2017	EP-W-17-020	0002

ITEM NO. (a)	SUPPLIES/SERVICES (b)	QUANTITY ORDERED (c)	UNIT (d)	UNIT PRICE (e)	AMOUNT (f)	QUANTITY ACCEPTED (g)
	09/16/2018 Delivery: 09/15/2019					
0004	Option Year 1: OPTIONAL TASK 8 Customer Experience (Option Line Item) 09/16/2018 Delivery: 09/15/2019					
0005	Option Year 2: Customer Advocacy Communications and Training Support (Option Line Item) 09/16/2019 Delivery: 09/15/2020					
0006	Option Year 2: OPTIONAL TASK 8 Customer Experience (Option Line Item) 09/16/2019 Delivery: 09/15/2020					
0007	Option Year 3: Customer Advocacy Communications and Training Support (Option Line Item) 09/16/2020 Delivery: 09/15/2021					
0008	Option Year 3: OPTIONAL TASK 8 Customer Experience (Option Line Item) 09/12/2020 Delivery: 09/15/2021					
0009	Option Year 4: Customer Advocacy Communications and Training Support (Option Line Item) 09/16/2021 Delivery: 09/15/2022 Continued ...					
	TOTAL CARRIED FORWARD TO 1ST PAGE (ITEM 17(H))				$0.00	

ORDER FOR SUPPLIES OR SERVICES
SCHEDULE - CONTINUATION

IMPORTANT: Mark all packages and papers with contract and/or order numbers.

DATE OF ORDER	CONTRACT NO.	ORDER NO.
09/15/2017	EP-W-17-020	0002

ITEM NO. (a)	SUPPLIES/SERVICES (b)	QUANTITY ORDERED (c)	UNIT (d)	UNIT PRICE (e)	AMOUNT (f)	QUANTITY ACCEPTED (g)
0010	Option Year 4: OPTIONAL TASK 8 Customer Experience (Option Line Item) 09/16/2021 Delivery: 09/15/2022 The obligated amount of award: $100,000.00. The total for this award is shown in box 17(i).					
	TOTAL CARRIED FORWARD TO 1ST PAGE (ITEM 17(H))				$0.00	

AUTHORIZED FOR LOCAL REPODUCTION
PREVIOUS EDITION NOT USABLE

OPTIONAL FORM 348 (Rev. 4/2006)
Prescribed by GSA FAR (48 CFR) 53.213(f)

LOCAL CLAUSE - EPA-B-32-103A - Limitation of Government's Obligation

(a) Severable services may be incrementally funded. Non-severable services shall not be incrementally funded. Contract line items **0001** through **0010** are severable and may be incrementally funded. For these items, the sum of **$100,000.00** of the total price is presently available for payment and allotted to this contract.

(b) For items identified in paragraph (a) of this clause, the Contractor agrees to perform up to the point at which the total amount payable by the Government, including reimbursement in the event of termination of those items for the Government's convenience, approximates the total amount currently allotted for those items to the contract. The Contractor shall not continue work on those items beyond that point. Subject to the clause entitled, "Termination for Convenience of the Government," the Government will not be obligated, under any circumstances, to reimburse the Contractor in excess of the amount payable by the Government in the event of the termination of applicable contract line items for convenience including costs, profit, and estimated termination costs for those line items.

(c) Notwithstanding the dates specified in the allotment schedule in paragraph (h) of this clause, the Contractor will notify the Contracting Officer, in writing, at least 5 days prior to the date when, in the Contractor's best judgment, the work will reach the point at which the total amount payable by the Government, including any cost for termination for convenience, will approximate 85% of the total amount currently allotted to the contract for performance of the applicable items. The notification will state (1) the estimated date when that point will be reached and (2) an estimate of additional funding, if any, needed to continue performance of the applicable line items up to the next scheduled date for the allotment of funds identified in paragraph (a) of this clause, or to a substitute date as determined by the Government pursuant to paragraph (d) of this clause. If, after such notification, additional funds are not allotted by the date identified in the Contractor's notification, or by an agreed substitute date, the Contracting Officer will terminate any item(s) for which additional funds have not been allotted, pursuant to the clause entitled "Termination for Convenience of the Government."

(d) The parties contemplate that, subject to the availability of appropriations, the Government may allot additional funds for continued performance of the contract line items identified in paragraph (a) of this clause and will determine the estimated period of contract performance which will be covered by the funds. If additional funds are allotted, the Contracting Officer will notify the Contractor in writing. The Contractor shall not resume performance of the contract line items identified in paragraph (a) until the written notice is received. The provisions of paragraphs (b) through (d) of this clause will apply in like manner to the additional allotted funds and to the new estimated period of contract performance. The contract will be modified accordingly.
(e) The Government may, at any time prior to termination, allot additional funds for the performance of the contract line items identified in paragraph (a) of this clause.

(f) The termination provisions of this clause do not limit the rights of the Government under the clause entitled "Default". The provisions of this clause are limited to the work and allotment of funds for the contract line items set forth in paragraph (a) of this clause. This clause no longer applies once the contract is fully funded.

(g) Nothing in this clause affects the right of the Government to otherwise terminate this contract pursuant to the contract clause entitled "Termination for Convenience of the Government".

(h) The parties contemplate that the Government may obligate funds to this contract in accordance with the following schedule:

RECAPITULATION:

	PRIOR AMOUNT	**THIS MOD.**	**NEW AMOUNT**
BASE PERIOD			
Total Maximum Amount:	**$0**	**$0**	**$1,390,743.00**
Funded Amount:	**$0**	**$0**	**$90,000.00**

BASE PERIOD OPTIONAL TASK 8 Customer Experience

Total Maximum Amount:	**$0**	**$0**	**$257,833.00**
Funded Amount:	**$0**	**$0**	**$10,000.00**

Request for Task Order Proposal (RFTOP)

Project Title: Customer Advocacy, Communications & Training Support

ITS-BISS 3

1. PERFORMANCE WORK STATEMENT (PWS)

1.1. Background and Purpose

This Task Order Request for Proposal (RFP) for Customer Advocacy, Communications & Training Support is being issued by the Environmental Protection Agency (EPA) with the intent to issue a Task Order

Legal Authority:

- 36 CFR Chapter XI, Part 1194 – Electronic and Information Technology Accessibility Standards
- 36 CFR Chapter XII, Subchapter B - Records Management
- Section 508 of the Rehabilitation Act (20 U.S.C. § 794d)

1.2 STATEMENT OF OBJECTIVES

Overview

The Office of Environmental Information (OEI) leads the Environmental Protection Agency's (EPA's) Information Management and Information Technology (IM/IT) Programs. It provides quality information technology and services essential for the Agency to advance the protection of human health and the environment. The EPA considers people, security and quality to be the Agency's foundational information management elements.

On July 24, 2016, OEI underwent a reorganization to incentivize its programs in five core areas:

- Encouraging new opportunities and better preparing their employees
- Enabling customer-focused services and solutions
- Enabling business anytime and anywhere
- Finding, understanding and using information for environmental protection
- Collecting, acquiring, exchanging and managing information more effectively and efficiently

As a result of the reorganization, the Office of Customer Advocacy Portfolio and Policy Management (OCAPPM), Customer Advocacy and Communications Division (CACD) was established.

OCAPPM's primary responsibilities include:

- Leading the management of EPA's IT portfolios,
- Modifying existing policies to improve upon business practices and developing new policies when appropriate,
- Monitoring and managing the customer's experiences and
- Ensuring OEI's effective communication with its customers

CACD is primarily responsible for distributing quality and accurate communications for OEI as well as ensuring all IT/IM products and services are communicated to our customers in a timely and accurate manner. In addition, CACD is also responsible for monitoring and tracking customer experiences (CX) and collecting and disseminating customer feedback to the appropriate service providers within OEI.

Under this TASK ORDER RFQ (TORFQ), CACD requires an acquisition and business partnership that can provide expert knowledge and skills in improving their communications, training and customers' experiences with OEI's services and products.

1.2 Objectives

The objectives to be achieved under this TORFQ is to acquire knowledgeable resources with expert skills that can assist CACD in identifying its customer base (customer audience), assess the various types of communication services and products, identify and help implement new communication methods, and find communication redundancies and eliminate them as appropriate. Via this TORFQ, CACD will determine the appropriate manner and type of communications that should be used and identify as many channels as possible to improve the flow of communications to and from the customer. Finally, this TORFQ will provide the additional resources needed to improve on the quality and efficiencies of OEI communications, training and improve upon the customer's experience relative to learning new products and services as well as make the customer experience exciting / positive and those products and services accessible and easy to use. The following represent the objectives to be acquired under this acquisition:

1. Task Order Program Management Support
2. Project Management Support
3. Communication Assessments
4. Communication Strategic Planning
5. Communication Outreach
6. Communication Presentations and Training
7. SharePoint Development
8. Customer Experience (Optional CLIN)
9. Transition

1.3 TASK REQUIREMENTS

This section defines the requirements of this task order, including tasks (or subtasks) to be performed and deliverables or services to be provided to meet the Task Order's Objectives. The contractor shall address these requirements in the Technical Approach section of their proposal.

TASK 1 TASK ORDER PROGRAM MANAGEMENT SUPPORT (Reference base 4.1 Integrated Program Support)

The Contractor shall provide Task Order Program Management Support, including but not limited to the following:

Subtask 1.1 Task Order Program Management Plan (TOPMP) (Reference base contract 4.2 Planning)

The Contractor shall create and submit a task order program management plan (TOPMP) within 15 business days after award of the Task Order (TO). The TOPMP shall meet Agency requirements as described in the respective tasks/subtasks for accuracy, completeness, and ease of use and shall include the Contractor's proposed plans for overall organization and management of tasks/subtasks as well as contain appropriate staffing, schedules, and cost/price estimates.

Subtask 1.2 Events and Meetings (Reference base contract 4.12 Training, Conference and Meeting Support)

The Contractor is responsible for attending regularly scheduled meetings as described in the TO TORFQ and other professional conferences, ad-hoc meetings or events as directed by the TOCOR/ATCOR. The contractor may be required to record and distribute meeting notes as appropriate.

The contractor shall provide and support OEI's Senior Leadership Team and OEI management, utilizing superior program management expertise and demonstrating best business practices pursuant to the objectives outlined in this contract, including but not limited to, the following:

a. Facilitate meetings to assist the management team with organizational development and goals.
b. Create communication/training products, including but not limited to action plans, road maps, charts, graphs or dashboards to help communicate organizational development goals to customers and staff.
c. Provide facilitation and assistance for meetings, which may include developing agendas, creating companion materials, and other related documents. This activity

does not include securing meeting space.

Subtask 1.3 Reporting (Reference section F.3 1552.211-72 Monthly Progress Reporting)

The Contractor shall provide Program Management Support, including but not limited to, the following:

a. Reports shall be written according to the respective TORFQ/TO guidelines or as directed by the TOCOR/ATCOR.
b. A comprehensive and standardized monthly report shall be created in coordination with the TOCOR/ATCOR and shall include, at a minimum: a list and brief description of deliverables completed and services, rendered; an account of travel conducted (if applicable); direct costs, hours and dollars expended; and the balance of hours and dollars remaining under TO ceilings for the current contract year.
c. The annual summary report shall include the following: all products and services completed and delivered under the appropriate tasks/subtasks, date of completion/delivery for all products, dollars and hours spent on each product/service, as stipulated under this TO.
d. Track and provide updates on progress on stipulated tasks/subtasks as identified by the TOCOR/ATCOR.

DELIVERABLES:

1.1 Task Order Program Management Plan (TOPMP) to be submitted in 15 business days upon award of TO.

1.2 Materials for Events to be submitted as directed by the TOCOR/ATCOR prior to the scheduled event.

1.2.2 Materials for Meetings to be submitted as directed by the TOCOR/ATCOR prior to the meetings.

1.3 Reports are to be submitted as directed by the TOCOR/ATCOR weekly, monthly and/or annually.

ACCEPTANCE CRITERIA:

All deliverables must be accessible, clear, concise, accurate and submitted on time.

TASKS 2 PROJECT MANAGEMENT SUPPORT (Reference 4.7 base contract and (b) Factor: Management Plan)

There will be occasions CACD will require the contractor to provide Project Management Support as appropriate to larger scopes of communications e.g., Agency wide communications. However, it is not a requirement of this contract that the contract resources have to be Project Management Professionals (PMP) Certified. The knowledge and skills can be demonstrated through providing sufficient past performance evidence. The contractor will be required to validate experience through the initiation, planning, execution, monitoring and controlling and closeout as appropriate. The components of the Project Management Planning will be determined by the EPA Project Lead and/or TOCOR/ATCOR.

DELIVERABLES:

2.1 Project Management Plan submitted 10 business day upon the TOCOR/ATCOR approval.

ACCEPTANCE CRITERIA:

All deliverables must be accessible, clear, concise, accurate and submitted on time.

TASK 3 COMMUNICATIONS ASSESSMENT (Reference 4.10 Studies, Analysis, and Program Support)

The contractor shall assess and identify the various types of communications throughout OEI's offices and categorize these communications into a communications portfolio. The communications portfolio will be the directory that will identify the types of communication products that can be accomplished by this TO. The contractor will be required to determine how communications can be improved upon the initial request to ensure accurate and efficient communications are prepared in accordance to the customer's request/needs. Communications Assessments (CAs) will be required per the type and/or size of the communications and intended audience of the communications. The Findings and Determinations (F&D) of the (CA) should be based on facts, customer's expectations, redundancies and ambiguous language that can be misinterpreted as well as include recommendations of improvement's.

Subtask 3.1 Assessments

Communication's Assessments generally are comprised of three components (1) Writing, (2) Reading and (3) Comprehensive and Critical Thinking, that should be applied as appropriate to each of the types of communications that are being assessed. The contractor is required to provide and support the following objectives under the CAs including but not limited to, the following:

a. Ensure accessibility of all products.
b. Determine if OEI is communicating effectively.
c. Help identify the major IT/IM concerns of Agency employees – including targeted groups as directed by the TOCOR/ATCOR.
d. Help CACD establish bench marks to determine if communication efforts are

successful.

e. Evaluate current status e.g. where we are currently and what are the problems and gaps.
f. Develop metric(s) to track communication effectiveness

DELIVERABLES:

3.1 Communications Assessment Plan - Submit Annually.
3.2.1 Findings and Determinations – as directed by the TOCOR/ATCOR or Communications Director.
3.2.2 When requested, develop survey's for CACD to determine if OEI is communicating effectively. Identify potential survey participants and survey tools.
3.2.3 When requested, identify different types of EPA employees and how to best communicate to each group, for instance scientists, IT professionals, and management.

ACCEPTANCE CRITERIA:

All deliverables are to be accessible, clear, concise, accurate and submitted on time.

TASK 4 COMMUNICATIONS STRATEGIC PLANNING (reference 4.2 Planning)
The contractor shall advise on best practices to support communications planning and suggest ways to disseminate this strategy across the OEI organizations, pursuant to the objectives outlined in this TO, including but not limited to:

a. Assist in creation of an OEI wide communications strategy, process and how to best implement OEI-wide.
b. Evaluate current communications processes and outline possible best practices for incorporation.
c. Aid in the development of key messages which strengthen OEI relationships with customers and stakeholders.
d. Recommend an approach to cataloguing key communications information to improve and streamline organization communications processes.
e. Assist with project/activity communications rollout plans for major new organizational initiative's, if they arise.

DELIVERABLES:

4.1 OEI Communications Strategic Plan - Submit Semi Annual

ACCEPTANCE CRITERIA:

All deliverables must be accessible, clear, concise, accurate and submitted on time.

TASKS 5 COMMUNICATIONS AND OUTREACH (reference 3.3 Enterprise and Cross Program Coordination)

One of the primary objectives to be achieved by Communications and Outreach is to gather in sessions with our customers, listen and document the customer's ideas and recommendations relative to communication deficiencies and communications improvements within OEI. There are many elements in developing an effective and efficient communications and outreach plan. The contractor shall design and develop a wide-array of communications products, pursuant to the objectives outlined in this task order (TO), including on an annual basis, but not limited to:

- Identifying the purpose of our communications
- Engaging with our stakeholders to understand their business better
- Identifying our audiences
- Planning and designing our messages around project/campaign calendars
- Considering our resources (can we afford to do videos for some of our communications?)
- Planning for obstacles and emergencies (be more strategic and less reactive)
- Strategizing how we'll connected with others who can help us spread our message, e.g. the Office of Internal Communications, other AA'ships, etc.
- Creating an action plan
- Evaluating our plan and adjusting it as necessary based on the results of carrying it out

Subtask 5.1 Identifying our purpose

What we may want to say depends heavily on what we're trying to accomplish with the contractor's communication strategy. CACD may be concerned with one or a combination of the following:

- OEI initiatives becoming known, or better known, within EPA
- Educating IT professionals and non-IT professionals about IT/IM initiatives and general IT/IM information
- Recruiting program participants or volunteers (e.g. iMigrated! Ambassadors)
- Announcing events
- Recognizing people within the IT community to be spotlighted
- Leadership buy-in on new methods of communications
- Winning over those who may be skeptical of our work
- Dealing with organizational emergencies – unintentional loss of data, cybercrime, unplanned outages of IT assets

Subtask 5.2 Engaging with our stakeholders and our customers

The contractor is required to conduct an audit of our stakeholders and customers to learn how to support them better. Exactly who are our stakeholders/customers? What are their needs?

Subtask 5.3 Identifying our audience

The contractor is required to know "who" are we trying to reach. Knowing who our audience is makes it possible to plan our communication logically. The communications approach will require different messages for different groups, as well as the need for different channels and methods to reach each of those groups.

There are many different ways to think about our audience and the ways they could best be contacted. First, there's the question of what group(s) we'll focus on. Here's an example of how can we group people according to a number of characteristics:

- *Demographics.* Demographics are simply basic statistical information about people, such as gender, age, ethnic and racial background, grade level, etc.
- *Geography*. We might want to focus on a specific parts of EPA, e.g. Regions, Labs, Headquarters.
- *Occupation.* We may be interested in people in a particular line of work, e.g. Scientists, IT Professionals, Budget Analysts.
- *Behavior.* We may be targeting our message to non-IT professionals, for example, or to mobile device users.
- *Attitudes.* Are we trying to change people's minds about a particular IT tool or application, or bring them to the next level of understanding?

Another aspect of the audience to consider is whether the communications should be directed to those whose behaviors, knowledge, or conditions we hope to influence, or whether the communication needs to be indirect.

Subtask 5.4 Planning and designing our messages around project/campaign calendars

When creating our messages, consider content, mood, language, design and time/frequency of distribution.

5.4.1 Content

- We should craft our messages with our audience in mind; planning the content of our message is necessary to make it effective; using plain language is necessary to make it understandable.

5.4.2 Mood

- Consider what emotions we want to appeal to.
  - Do we want people to be concerned about safety?
  - Do we want people to be excited about a new technology?
- The mood of our message will do a good deal to determine how our audiences react to it. Keeping our tone positive will usually reach more people than evoking negative feelings such as fear or anger.

5.4.3 Language and Design

- Use the appropriate language and terminology for our different audiences. No matter the audience, technical or non-technical, always use plain-language so that the message is understandable.

- If our message is too informal, our audience might feel we're talking down to them, or if our message is too formal, our audience might feel we're not talking to them at all. ***Again, the outreach approach and plan should use plain, straightforward language that expresses what we want to say simply and clearly***.
- Time/frequency of distribution
    - Every project should have a communications calendar that outlines when, how often, on what channels and to whom messages or communications supporting that project should be sent
    - The calendar should be clear, easy to understand and kept up-to-date
- Channels of communication
  What does our intended audience read, listen to, watch, engage in? We have to reach them by placing our message where they'll see it.

    - Posters
    - Electronic Bulletin Boards
    - Fliers and brochures - These can be more compelling in places where the issue is already in people's minds
        - All Hands & AA Updates
        - Training Classes
        - Orientations
        - Etc.
    - Newsletters
    - Intranet sites (This Week @ EPA)
    - SharePoint sites (CIO SharePoint site, CACD SharePoint site, CX SharePoint site, etc.)
    - Mass-mailer Emails
    - Presentations or presence at various All Hands and Town Halls for other line offices and AA'ships
    - Word of mouth
    - Videos
    - Etc.

<u>Subtask 5.5 Considering our resources</u>

- What do we have the money to do?
- What tools do we need to get things done and are they affordable?
    - Adobe Suite
    - Powtoon subscription
    - Video equipment
    - Video production
    - Graphic design work
    - Grammarly subscription
- Do we have the people to make it possible?
- If we're going to spend money, what are the chances that the results will be worth the expense?

- Who will lose what, and who will gain what by our use of financial and human resources?

The plan should include careful determinations of how time and the type of resources should be expended developing the communications plan. The contractor should always consider our return on investment (ROI) before making resource decisions and seek review and approval from the EPA SME and/or TOCOR/ATOCOR as appropriate.

Subtask 5.6 Anticipating obstacles and emergencies

Any number of things can happen in the course of a communication effort.

- Someone can forget to e-mail an unplanned outage notification
- A phone number or e-mail address can accidentally get left out of an important email
- An important word on one of our posters or in one of our brochures can be misspelled
- An important communication cannot be sent out due to an unplanned network outage

These types of incidents can potentially bring discredit upon our communications program. The contractor is required to anticipate these kinds of problems, and to create an action plan to deal with the issue, resolving the problem in a timely and efficient manner. Example: Crisis planning should be part of our communication plan, so we'll know exactly what to do when a problem or crisis occurs. Crisis plans should include who takes responsibility for what – and deal with:

- Correcting errors, deciding when something has to be redone rather than fixed, etc.
- Covering as many situations, and as many aspects of each situation, as possible

Subtask 5.7 Strategizing how we'll connect with others to spread our message

Establishing relationships with other entities within EPA should be an important part of our communication plan, as should be establishing relationships with influential individuals (EPA Senior Leaders) and/or the population we're trying to reach. i.e.,:

5.7.1 We can do this by:

- Providing excellent customer service
- Always being as responsive as possible
- Being empathetic to the needs of our customers
- Making personal contacts
- Giving others the reason to want to help us
- Following through over time to sustain those relationships in order to keep our communication channels open

Subtask 5.8 Creating an action plan

5.8.1The expectation is to put it all together into a plan that CACD can act on. By this time, we know:

- What our purpose is and whom we need to reach to accomplish it
- What our message should contain and look like
- What we can afford
- What problems we might face
- What channels can best be used to reach our intended audience, and how to gain access to those channels

- Putting the details together – actually composing and designing our message (perhaps more than one, in order to use lots of channels), making contact with the people who can help us get our message out, and getting everything in place to start our communication effort.
- And finally, CACD will evaluate the effort so that we can continue to make it better.

Subtask 5.9 Evaluating performance and adjusting our plan
CACD will evaluate our communication plan in terms of both how well we carry it out and how well it works, the contractor we'll be able to make changes to improve it. It will keep getting more effective each time we implement it. Essentially, CACD must have a method of measuring how effective our communications efforts are, and continue to improve upon those efforts by adjusting our plan and communicating with our audiences, stakeholders and customers.

Subtask 5.10 Communication Outreach Materials and Products (Reference base 4.9 Customer Relationship Management)

The contractor shall also be required to provide the following Communications Outreach Materials and Products as well as ensure all products adhere to all Federal/EPA Agency Regulations but not limited to:

a. Develop a report type document that outlines the customer's goals and successes as well as failures.
b. Develop project-specific plans; OEI office communication plans; consistent messaging language for communication products, as well as identify communication risks.
c. Develop communication milestones or dashboards.
d. Identify, develop and provide accessible graphic arts and visual information for websites; banners; logos; posters; infographics; dynamic flow or organizational charts; process or technical diagrams. Use of a stock royalty-free image supplier would help the contractor identify images, vectors or illustrations for communication products.
e. Develop accessible communications materials i.e., brochures, closed captioned videos, fact sheets, user guides, frequent questions, quick reference guides, newsletters, EPA intranet web content, blog content, flyers or other key communications and outreach materials.
f. Re-design with accessibility, ensure that content is up-to-date, improve content and implement content changes for existing OEI intranet websites, web pages and SharePoint sites. Contractor needs access to EPA's intranet to complete work.
g. Design, develop and build accessible web pages for new OEI Intranet websites, web pages and SharePoint sites.
h. Ensure that all hyperlinks are accurate in all communications materials. Contractor needs access to EPA's Intranet to complete work.

i. Develop accessible newsletter designs and related content for customer-specific audiences.
j. Support and develop accessible executive-type presentation materials, such as talking points or meeting presentations.

DELIVERABLES:

5.1 Communication Outreach Plan – as directed by the TOCOR/ATCOR.

5.1.1 Communications Outreach Materials - as directed by the TOCOR/ATCOR.

5.1.2 All deliverables must include proof of conformance with 36 CFR Part 1194.21, 1194.22, 1194.24, Subparts B-D through the Voluntary Product Accessibility Template.

ACCEPTANCE CRITERIA:

All deliverables must be accessible, clear, concise, accurate and submitted on time.

TASK 6 COMMUNICATIONS PRESENTATIONS AND TRAINING (Reference 4.12 Training, Conferences and Meeting Support)

The contractor will be required to facilitate and brief CACD on all communications presentations, briefings, training sessions (if applicable), demonstrations, and educational programs regarding information products, services and databases. The contractor shall be organized, set-up, and conduct the presentation and communication's training per the TOCOR/ATCOR/Communications Director/Training Coordinator. All corresponding materials shall be created in accordance with 36 CFR Part 1194.21, 1194.22, 1194.24, Subparts B-D and facilitated in accordance with the contract and program policies governing media.

Subtask 6.1 Presentations and Promotions

The Contractor shall develop as well as ensure all materials, products and support are accessible briefings, outreach sessions, and educational programs to instruct customers in the use and availability of information products and services. The Contractor shall participate in, set-up, and conduct demonstrations of EPA's information products, services, and databases for a broad array of customers. Demonstrations may be held at professional conferences or at local sites, via webinar or in person. Any materials prepared must be in accordance with EPA's regulations and policies governing that particular medium and format.

Subtask 6.2: Training

The Contractor shall develop and offer training as outlined in the contract or as directed by the TOCOR/ATCOR/Training Coordinator. The Contractor shall work with the Training Coordinator to reserve EPA training areas or equipment as necessary. The Contractor shall provide relevant training materials for participants.

Examples of current and past training topics include:

- Agency standard software including Office 365 and Adobe Connect; hardware;
- Agency-specific IT processes (i.e. EPASS log in), and new rollouts

The Contractor shall support the development and delivery of training materials and management of the IT training program. Provide general administrative and scheduling support, including but not limited to:

a. Develop IT training monthly calendar.
b. Maintain an internal (CACD Training Team) calendar for the program team.
c. Respond to customers' requests, attending customer request meetings and adding customer requests to internal calendar.
d. Update and maintain the IT training projects spreadsheet or other dashboards/tracking lists as management requires.
e. Develop agendas for meetings with trainers and other stakeholders as necessary; following up on action items.
f. Review attendance and survey results and provide summary of trends and recommendations to CACD as appropriate.
g. Assist customers via the EPA IT Training Program email box, including notes of action items and distribute as agenda items on follow-on meetings as appropriate.
h. Develop IT Tip, newsletter entries, flyers, communication materials, as needed.
i. Update and maintain all types of information available on the SharePoint site and registration system, troubleshoot problems, respond to customers as needed.
j. Complete specific training projects as needed or requested by the Training Coordinator and/or as directed by the TOCOR/ATCOR.
k. Provide IT trainer(s) to develop curriculum and present live trainings, either in person or via webinar, to EPA employees and SEEs (optional).

DELIVERABLES:

6.1 Promotion Materials - 30 days upon event and/or as directed by the TOCOR/ATCOR/Training Coordinator.

6.2 Training Materials - 30 days upon training event and/or as directed by TOCOR/ATCOR/Training Coordinator.

6.3 All deliverables must include proof of conformance with 36 CFR Part [1194.21](), [1194.22](), [1194.24](), [Subparts B-D]() through the [Voluntary Product Accessibility Template]().

ACCEPTANCE CRITERIA:
All deliverables must be accessible, clear, concise, accurate and submitted on time.

TASK 7 SHAREPOINT DEVELOPMENT (Reference 4.10 Studies, Analysis, and Program Management Support)
The contractor shall provide SharePoint site development, maintenance and troubleshooting as necessary for CACD SharePoint sites.

DELIVERABLES:
7.1 SharePoint sites with integrated workflows, apps, or other custom requirements as directed by TOCOR/ATCOR or Communications Director.

ACCEPTANCE CRITERIA:
All deliverables must be accessible, clear, concise, accurate and submitted on time.

TASK 8 OPTIONAL CLIN (Customer Experience to be included) (Reference 4.9 Customer Relationship Management and 2.0 PWS Objectives)
The Office of Customer Advocacy Portfolio and Program Management (OCAPPM) requires contractor support in creating an environment that enriches and supports the needs of the customer therefore, improving upon the Customer's Experience (CX). The objective's to be achieved under this CLIN is to evaluate the customer's experience's and be proactive and able to identify the problems in terms of quality, accuracy and efficiencies as well as provide alternative resolutions of service to the customer.

This EPA Customer Experience Management Team (CEMT) in collaboration with the contract support resources will work in partnership to monitor, track and mitigate the Customer Experiences (CX) outcomes. The following provide the objectives not inclusive and limited to the following:

a. Develop a CX Pilot with other EPA program's as directed by the CEMT, TOCOR/ATCOR.
b. Conduct "IT Town Halls" in all Regional Program Information Offices (RPIO's) as directed by the CEMT, TOCOR/ATCOR.
c. Assist in developing a Customer Experience Council.
d. Identify major pain points for CX and Information Technology Service

Management (ITSM).

e. Identify “quick CX incentives.
f. Create a CX Action Tracker.
g. Conduct Market Research to determine appropriate Customer Research Management (CRM) as directed by the CEMT, TOCOR/ATCOR.
h. Develop briefing materials and as directed by the CEMT, TOCOR/ATCOR.
i. Develop, Coordinate and assist in the collaborations of other program offices.
j. Develop and assist in investigative tools and techniques that will monitor the CX and the performance metrics for the program outside OCAPPM.
k. Assist the CEMT in the investigations in various EPA IT/IM products and services as directed by the CEMT, TOCOR/ATCOR.
l. Develop questions to include EPA IT/IM in the Federal Employee Viewpoint Survey (FEVS).

DELIVERABLES:

8.1 Customer Experience Management Plan to be submitted upon CEMT, TOCOR/ATCOR.

ACCEPTANCE CRITERIA:

All deliverables must be accessible, clear, concise, accurate and submitted on time.

TASK 9 TRANSITION (Reference 2.0 Objectives)

The Contractor shall develop and then execute a plan to transfer all historic data, work, business and technical documentation, and software from the incumbent contractor to the succeeding government entity or contractor within the final 120 days of the awarded contract period.

a. The Contractor shall submit a phase-out plan to the TOCOR/ATCOR at the beginning of the transition period or as directed by TOCOR/ATCOR.
b. Any revisions to the plan requested by the TOCOR/ATCOR shall be made within 10 business days.
c. The Contractor shall include a schedule for transfer of work, documentation, and software from the incumbent contractor to the succeeding government entity or contractor if applicable.
d. The Contractor shall transfer all business and technical documentation.
e. The Contractor shall disposition contractor purchased government owned assets, including but not limited to, equipment, furniture, phones, and computers.
f. The Contractor shall transfer all Government Furnished Equipment (GFE) and Government Furnished Information (GFI) and provide GFE inventory management assistance if applicable.

g. The Contractor shall turn over all government keys, ID/access cards and security codes if applicable.
h. The Contractor shall ensure that no significant disruptions to user services and support occur during the transition period.
i. The Contractor shall meet with the TOCOR/ATCOR within the last five (5) business days of the transition period to provide a transition status of performance.

DELIVERABLES:
9.1 Transition Plan to be submitted as directed by TOCOR/ATCOR.

ACCEPTANCE CRITERIA:
All deliverables must be accessible, clear, concise, accurate and submitted on time.

1.4 Reporting Requirements and Deliverables

DELIVERABLE NUMBER	DELIVERABLE TITLE	DELIVERABLE FREQUENCY
1.1	Task Order Program Management Plan (TOPMP)	To be submitted in 15 business days
1.2	Events Materials	As directed by TOCOR/ATCOR.
1.2.2	Meeting Materials	As directed by TOCOR/ATCOR.
1.3	Reports	Weekly, Monthly and/or Annual as designated by the TOCOR/ATCOR
2.1	Project Management Plan	10 days upon approval of the project
3.1	Communications Assessment Plan	Annually. Additional clarifications will be provided by the TOCOR/ATCOR.
3.2.1	Findings and Determinations	As directed by the TOCOR/ATCOR/ Communications Director
3.2.2 and 3.2.3	Communications Survey	As directed by the TOCOR/ATCOR/ Communications Director
4.1	Communications Strategic Plan	Semi Annual

5.1	Communications Outreach Plan	As directed by the TOCOR/ATCOR/ Communications Director
5.1.1	Communications Outreach Material	As directed by the TOCOR/ATCOR/ Communications Director
6.1	Promotion Material	As directed by TOCOR/ATCOR
6.2	Training Materials	As directed by TOCOR/ATCOR
7.1	SharePoint Development	As directed by TOCOR/ATCOR
8.1	Customer Experience Strategic Plan	As directed by the TOCOR/ATCOR
9.1	Transition Plan or Phase Out Plan	As directed by TOCOR/ATCOR

The contractor shall prepare a Quality Assurance Project Plan for this task order. See section 2.1

For most deliverables, the EPA TOCOR will assign tentative due dates and instructions when work is routed to the Contractor. If within three business days, the contractor expresses no concern regarding the due date; the date shall be deemed settled by tacit agreement.

The contractor shall provide a monthly technical and financial progress report as per the contract clause F.3 1552.211-72 MONTHLY PROGESSS REPORT (JUN 1996).

1.5 Acceptable Quality Level for Tasks

See Attachment: Quality Assurance Surveillance Plan

1.6 Method of surveillance

Reports prepared by the contractor undergo a secondary review process in OPP. Each report has a designated EPA reviewer. The EPA reviewer conducts a detailed review of the contractor's summary of relevant data and examines the conclusions drawn by the contractor in accordance with the criteria described in the task Order. Once the EPA reviewer has finalized the data evaluation in the form of an Agency review, the report may be used officially. The EPA reviewer will complete an EPA Reviewer's Assessment Form that notes discrepancies, omissions, inaccuracies and/or inappropriate data evaluations ("errors"). The TOCOR or Contract Level COR will calculate, quarterly, the average number of reports containing substantive technical, guideline, or format errors. The CORs will compare agency due dates or approved revised due dates to completed date of reports, quarterly and calculate the percentage of late reports.

1.7 Period of Performance

The period of performance of this task order is:

Base: 12 months from date of award

Task 8 Optional CLIN: 12 months from option exercise

Option 1: 12 months from option exercise

Task 8 Optional CLIN: 12 months from option exercise

Option 2: 12 months from option exercise

Task 8 Optional CLIN: 12 months from option exercise

Option 3: 12 months from option exercise

Task 8 Optional CLIN: 12 months from option exercise

Option 4: 12 months from option exercise

Task 8 Optional CLIN: 12 months from option exercise

1.8 Task Order Type: Time & Materials

2. INSPECTION AND ACCEPTANCE

2.1 Quality Assurance Project Plan (See Attachment 1)

The Contractor shall submit the following quality system documentation to the CO at the time frames identified below:

This documentation can be found on the following EPA website – https://www.epa.gov/quality/epa-qar-5-epa-requirements-quality-assurance-project-plans

This documentation will be prepared in accordance with the specifications identified above or equivalent specifications defined by EPA.

The Government will review and return the quality documentation, with comments, and indicating approval or disapproval. If necessary, the contractor shall revise the documentation to address all comments and shall submit the revised documentation to the government for approval.

The Contractor shall not commence work involving environmental data generation or use until the Government has approved the quality documentation.

3. Other Proposal Information

This section provides additional information on task order requirements, such as on-site contractor support, government furnished property, period of performance, and contract type/pricing structure, i.e., firm-fixed price or time-and-materials/labor hour for this task order.

MANAGEMENT CONTROLS (Reference base Task 4.1 Integrated Program Support)

The following management controls are intended to ensure that Agency officials remain accountable, retain control over the Contractor's final work product as well as ensure the Contractor's services do not place EPA in a vulnerable position. The TOCOR/ATCOR is responsible for assuring the contractor complies to all terms and conditions of the TO as follows:

- Work may or may not be off-site, depending on named organizations, service and/or product.

- The TOCOR/ATCOR will monitor the deliverable schedule and review the deliverables to ensure that the content and quality are responsive to the requirements of the TORFQ. Under this TO, the TOCOR/ATCOR may not provide technical direction to the Contractor which would affect the overall scope of the TO or price without consulting with the contract COR (if applicable) and CO. Technical communication are permitted between the TOCOR/ATCOR and Contractor for the sole purpose of providing clarification or preliminary advisement of issues or problems as permissible. Clarifications to deliverables will be requested through technical direction as appropriate.

- The Contractor shall submit all deliverables and documents for publication to the TOCOR/ATCOR prior to public release, if applicable.

- Contractors shall clearly identify themselves as an EPA contractor when acting in fulfillment of this TO. While working onsite or meeting with federal employees, contractors shall wear or display government issued identification designating them as such. Contractors shall be excluded from sensitive Agency discussions related to policy, enforcement, legal matters, and procurements.

- EPA shall be mentioned as the funding source in publications and other distributed final work products that arise from this contract TO.

4. TASK ORDER ADMINISTRATION DATA

3.1 Contract Administration Representatives

Contracting Officer: Keith Westry, Westry.Keith@epa.gov

Contract Level Contracting Officer's Representative: Kim Farmer, farmer.kim@epa.gov

Task Order Contracting Officer's Representative: Holly Fenderson
Alternate Task Order Representative: Tisha McFarland

3.2 INVOICING

Invoices shall be submitted in accordance with the contract under which this task order is awarded through FedConnect to the CO, CS, and TOCOR. Invoices shall be submitted electronically to: US EPA FINANCE OFFICE AT RTPRECEVING@EPA.GOV

For format and guidance refer to: http://www2.epa.gov/financial/contracts#Contract_invoices
The customer service contact information for the finance office is contractpaymentinfo@epa.gov and 919-541-1148.

4. TASK ORDER CLAUSES

4.1 FAR 52.217-7 Option for Increased Quantity -- Separately Priced Line Item (Mar 1989)

The Government may require the delivery of the numbered line item, identified in the Schedule as an option item (service), at the price stated in the Schedule. The Contracting Officer may exercise the option by written notice to the Contractor within *14 calendar days*. Delivery of added items (services) shall continue at the same rate that like items are called for under the contract, unless the parties otherwise agree.

(End of Clause)

4.2 FAR 52.217-9 Option to Extend the Term of the Contract (Mar 2000)

(a) The Government may extend the term of this contract by written notice to the Contractor within 5 calendar days before the expiration of this contract; provided that the Government gives the Contractor a preliminary written notice of its intent to extend at least 30 days before the contract expires. The preliminary notice does not commit the Government to an extension.

(b) If the Government exercises this option, the extended contract shall be considered to include this option clause.

(c) The total duration of this contract, including the exercise of any options under this clause, shall not exceed 60 months.

(End of clause)

4.3 EPAAR 1552.237-72 Key personnel. (APR 1984)

(a) The Contractor shall assign to this contract the following key personnel:

Task Order Program Manager and Task Project Leads as appropriate.

5-1 EPA-J-52-101 LIST OF ATTACHMENTS

NO ATTACHMNENTS

6. INSTRUCTIONS, CONDITIONS, AND NOTICES TO OFFERORS

6.1 Questions

Questions must be submitted 5 days after issuance of RFTOP

6.2. EPA-L-36-101 RFTOP Proposal Instructions

(a) The offeror's response shall not exceed 25 double sided pages each. This limitation does not include resumes, charts, figures, or illustrations.

(b) **Technical proposal instructions –**

(1) The technical proposal shall be complete and demonstrate an understanding of the work to be provided and the contractor's ability to perform the work in accordance with PWS. The technical proposal shall address all of the technical evaluation criteria presented in this section.

(2) Each section of the proposal shall be titled.

(3) Subcontractors

Each offeror shall list in a table format the name and addresses of all subcontractors who will perform work or labor or render services to the offeror for compensation in an amount in excess of one percent of the offeror's total price. Each offeror shall show on the table the portion of the work to be done by each subcontractor. This table shall be included with the technical proposal. The table shall include: (a) the name and location of the subcontractor, (b) a short description of the work the subcontractor will be designated to perform or deliver, (c) the portion in percent of the work the subcontractor will be designated to perform or deliver.

(4) Conflict of Interest

Vendors shall provide a completed version of the certification at EPAAR 1552.209-72 Organizational Conflict of Interest Certification (APR 1984) as part of its Technical Proposal. The complete certification will not count against the page limitations for the Technical Proposal.

Consistent with the terms of the prime contract, vendors shall disclose any actual or potential conflict of interest to the Contracting Officer as early as possible and prior to submission of any proposal. The disclosure shall include a description of actions which the Contractor has taken or proposes to take, after consultation with the Contracting Officer, to avoid, mitigate, or neutralize the actual or potential conflict of interest. Upon receipt of the information, the Contracting Officer shall make a final decision within three (3) business days.

For the purposes of this RFP, EPA does not believe an actual or potential conflict of interest may exist under this TO.

(c) Technical Evaluation Criteria

FACTOR 1: **Technical Capability:** The Contractor shall propose their Technical Approach for accomplishing the objectives, requirements, and tasks and subtasks of the task order.

Sub-Factor 1 Management Approach: The contractor shall describe its Management Approach in the form of a Task Order Management Plan. At a minimum, the TOMP (or MP) shall address the planning, implementation, reporting (including funding burn rates), TOCOR communications, and team management elements of managing the task over its period of performance. The MP shall include the approach for reporting status of all milestones and deliverables and provide proposed performance measures and a Quality Assurance Plan for the task order.

Sub-Factor 2 Staffing Approach: The offeror shall submit a Staffing Plan which illustrates its understanding of the requirement, as well as availability of key and non-key employees to contribute to this requirement. This Staffing Plan shall outline the key and non-key personnel to be assigned to perform this task order. The information shall include present employment status, proportion of time available for this task order, as well as the nature and extent of commitment to other projects. For key personnel, the offeror shall disclose the ability to replace individuals with equally qualified personnel if the key personnel need to be replaced. If personnel are not presently employed by the company, include letters of intent. The offeror shall specifically address the expertise and experience of proposed individuals (both key and non-key personnel) for conducting the tasks identified in the task order.

(d) Task order evaluation (check one):

_X__Best Value with Tradeoffs

___Lowest Price Technically Acceptable

(e) Price Proposal:

Instructions:

The purpose of these cost instructions is to assist offerors in submitting information required to evaluate the reasonableness of proposed costs. All dollar amounts provided shall be rounded to the nearest dollar. The labor rates used for this task order must be consistent with the labor rates included in the base IDIQ contract.

Pricing Documents:

Offerors must complete Attachment 2, Pricing Document. Estimated hours are given for the Base, Task 8 and Option Periods and will be used to develop the offeror's Pricing Document. All labor categories must be completed with a fully burdened labor rate. For evaluation purposes Other Direct Costs (ODCs) are inserted at $9,000 per year.

*Note - The estimated number of labor hours and ODCs are for SOURCE EVALUATION AND SELECTION PURPOSES ONLY. All rates for labor on this task order will be the same for each labor category whether a prime or team subcontractor performs the work.

ATTACHMENT 1

QUALITY ASSURANCE SURVEILLANCE PLAN

PERFORMANCE REQUIREMENT	PERFORMANCE MEASURE (PM)	PERFORMANCE STANDARD	SURVEILLANCE METHOD	INCENTIVES & DISINCENTIVES

TO MANAGEMENT AND COMMUNICATION: The contractor shall maintain contact with the EPA CO, Contract COR, and TOCOR/ATCOR throughout the performance of the contract.	Contractor shall immediately bring potential problems to the appropriate EPA personnel and shall recommend actions that would mitigate or resolve the problem.	Issues that impact project schedules shall be brought to the attention of the EPA within 3-days of occurrence.	All active task orders will be reviewed by the EPA TOCOR/ATCOR to identify unreported issues.	Performance will be considered in the award of subsequent task orders and will be factored into the annual evaluation of Management of the effort in the Contractor Performance Assessment Reporting System (CPARS).
TIMELINESS: For every Task Order awarded establishing a firm, specific delivery date for the generation of a report, the contractor shall deliver such report to the EPA CO, Contract COR and TOCOR/ATCOR no later than the time specified in the order's PWS as applicable.	Deliverables and related work must comply with contractual timeliness of the requirements. The contractor will be evaluated on its responsiveness to all task orders.	95% of all deliverables and related work shall be completed on time within task schedule and/or technical. direction requirements.	100% inspection of all deliverables and related work by the TOCOR/ATCOR will document the timeliness of all work requirements.	Performance will be considered in the award of subsequent task orders and will be factored into the annual evaluation of Schedule in the Contractor Performance Assessment Reporting System (CPARS).
QUALITY: For every task/subtask the work products and responses to customers provided by the contractor shall be complete, accurate, thorough and professional. All services provided shall be performed in accordance with the Agency requirements outlined in the task/subtasks.	All deliverables and related work must be complete, accurate, thorough credible and accessible where applicable.	All work that does meet the acceptance criteria defined in the TO PWS will be resubmitted at no cost to the government.	The TOCOR/ATCOR is responsible for evaluating work produced and determining its quality. Feedback will be provided.	Performance will be considered in the award of subsequent task orders and will be factored into the annual evaluation in the category of Quality of Product or Service in the Contractor Performance Assessment Reporting System (CPARS).
COST CONTROL: The contractor shall track costs and funding at the task order level, and remain within the ceiling of the task order. The contractor shall communicate to the EPA CO, Contract COR, TOCOR/ATCOR any budget issues arising from work issued under a task order.	Contractor shall immediately bring potential problems to the EPA TOCOR/ATCOR and shall recommend actions that would mitigate or resolve the problem. All monthly financial reports must be complete, accurate, and thorough.	Issues that impact costs shall be brought to the attention of the EPA TOCOR/ATCOR within 3-days of occurrence.	TOCOR/ATCOR will conduct secondary reviews of monthly reports and invoices completed by the contractor	Performance will be considered in the award of subsequent task orders and will be factored into the annual evaluation in the category of Cost Control in the Contractor Performance Assessment Reporting System (CPARS).

STAFFING: The contractor shall provide staffing that meets the requirements of each task order so that uninterrupted, high quality service is provided.	Data should be submitted monthly to the Contract COR, TOCOR/ATCOR indicating vacant positions and the status of filling the positions.	Any vacant positions shall not remain unfilled more than 60 days.	Review and discuss with the EPA TOCOR/ATCOR how activities will be accomplished if there are vacant positions.	Performance will be considered in the award of subsequent task orders and will be factored into the annual evaluation of Management of the effort in the Contractor Performance Assessment Reporting System (CPARS).